

# Creating and Maintaining a Private Provider

**Note:** Private Provider records for in and out of state group homes, residential care centers, child placing agencies, and shelters are created and maintained by State provider contacts. All other private provider records are created and maintained by counties. For out of state facilities, send an email to [CBCProject@wisconsin.gov](mailto:CBCProject@wisconsin.gov) to have the provider created. Please include the facility name, the license, the FEIN (Federal Employer Identification Number), and a contact for the facility.

1. From the desktop, go up to the Provider tab and click on the [Create private provider](#) hyperlink. This will open the Private Provider page.

The screenshot shows the eWiSACWIS desktop interface. The top navigation bar includes links for Home, Cases (4), Providers (5), Workers (1), Approvals (3), Access Reports (4), ICPC Referrals (1), and Home Inquiries. The Providers (5) tab is selected. Below the navigation bar, the 'Providers' section is displayed. It includes a 'Filter by:' section with checkboxes for 'Date restricted' and 'Not approved/cancelled', and a 'Providers: 5' count. There are two hyperlinks: 'Create provider work' and 'Create private provider', the latter of which is highlighted with a red box. A search bar and refresh buttons are also visible.

2. From the Type drop-down, select the applicable option. Select an option from the Lcns. Type drop-down and enter the Lcns. Agency. Depending upon the Type option chosen, there will be either a Provider Search or Person Search hyperlink. Click the associated search hyperlink.

The screenshot shows the 'Private Provider' form in the eWiSACWIS system. The form is titled 'Basic' and includes fields for Name, Open Date, Type (set to 'Other - Organization'), Status (set to 'Pending'), Lcns. Type (set to 'Not Licensed'), and Lcns. Agency (set to 'not licensed'). There is a checkbox for 'Restricted Provider'. Below these fields are tabs for 'Provider', 'Background Checks', 'Characteristics', 'Services', and 'Closing History'. The 'Provider' tab is selected, showing 'Provider Information' and 'Additional Information' sections. The 'Provider Information' section includes fields for Name (with a 'Provider Search' link), C/O, Street, Apt., WI City, City, State, ZIP, Country, Phone, Ext., Fax, E-Mail, and County of Residence. The 'Additional Information' section includes a 'Parent Agency' section with radio buttons for 'N/A', 'SSN', and 'FEIN', and checkboxes for 'Not For Profit Agency', 'Medical Provider', and 'Co-Located'. There is also a 'County Provider ID' field. At the bottom, there are 'Options', 'Go', 'Insert', 'Save', and 'Close' buttons.

3. On the Provider Search page, enter the name of the provider and click Search. When the provider is not returned, click the Close button on the Validation Errors message. Then click the Close button on the Provider Search page to return the provider's name to the Private Provider page.

**Note:** If the provider is returned, then the provider record already exists. Select the radio button for the returned provider and click Continue.

**Note:** If the provider is an individual, the Person Search page will appear. If the person is returned, click the radio button for the person and click Continue. If the person is not returned, click the Create button and create the person.

The screenshot displays the 'Provider Search -- Webpage Dialog' window. The title bar reads 'Provider Search -- Webpage Dialog'. The header features the 'eWiSACWIS' logo and navigation links for 'Print', 'Spell Check', 'Help', and a question mark icon. The main content area is titled 'Search Criteria' and contains several input fields: 'Provider Name' (filled with 'Waupaca Co Health and Human Services'), 'First Name', 'Provider ID', 'Parent Agency ID', 'Provider Type' (a dropdown menu), 'Site #' (a dropdown menu), 'County' (a dropdown menu), and 'ZIP Code'. There are also checkboxes for 'Date Restricted' (checked) and 'View Not Approved/Cancelled' (unchecked), and a 'Search Precision' slider set to 'Med'. A 'Search' button is located at the bottom right of the search criteria section. Below the search criteria is a section titled 'Providers Returned' which is currently empty. A 'Validation Errors -- Webpage Dialog' window is overlaid on the main window, displaying the message: 'You must correct the following errors before proceeding:' followed by a bulleted list: 'No matching data found for the criteria specified.' A 'Close' button is at the bottom of the validation error window. At the bottom right of the main window, there are 'Continue' and 'Close' buttons.

4. On the Private Provider page, add the address, phone, e-mail, and county of residence information.
5. In the Additional Information group box, add the SSN or FEIN, if applicable. Select the applicable checkboxes for nonprofit agency, medical provider, or a co-located facility (for detention and shelter facilities that are located in the same building).

**Private Provider - Windows Internet Explorer**

**eWiSACWIS** TM Print Spell Check ABC Help ?

**Basic**

Name: Waupaca Co Health and Human Services Open Date: Type: Other Government Agency Status: Pending

Lcns. Type: Not Licensed Lcns. Agency: not licensed ☐ Restricted Provider

**Provider** Background Checks Characteristics Services Closing History

**Provider Information**

Name: Waupaca Co Health and Human Services [Provider Search](#)

Provider Name: Waupaca Co Health and Human Services

C/O:

Street: 811 Harding Street Apt: [Potential Address Matches](#)

WI City: Waupaca, 54981 City: Waupaca State: WI ZIP: 54981

Country: United States Phone: (715)258-6448 Ext: Fax:

E-Mail: County of Residence: Waupaca

**Additional Information**

Parent Agency:

☒ N/A ☐ SSN ☐ FEIN ☐ Not For Profit Agency ☐ Medical Provider ☐ Co-Located

Options: [Go](#) [Save](#) [Close](#)

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6. The County Provider ID group box allows you to enter your internal provider number by selecting Insert. Enter your internal provider ID in the Provider ID field. The Check Display defaults the name of the provider but can be updated. The Delete hyperlink allows you to delete the county provider name and ID.
7. The Contact Information group box is user entered. Enter any applicable information.

**County Provider ID**

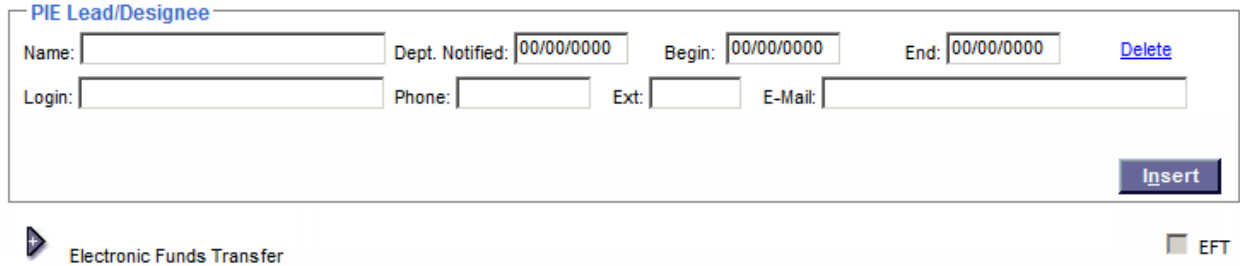
County: Provider ID: Payee Name Type: Facility Name [Delete](#)

Check Display: Waupaca Co Health and Human Services [Insert](#)

**Contact Information**

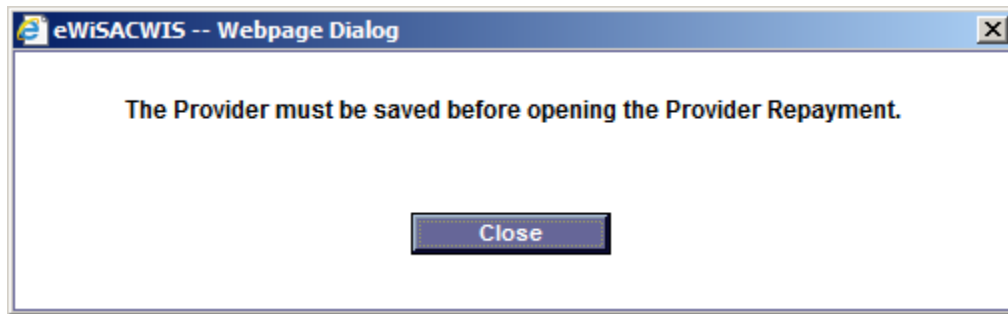
	Name	Phone	Ext	Fax	E-Mail
Primary Contact:					
Director:					
Program Director:					
Fiscal:					

8. The PIE Lead/Designee is used by the Child Welfare Licensing Section to document information for child placing agencies, group homes, residential care centers, and shelters. The Electronic Funds Transfer expando is not available for county use at this time.



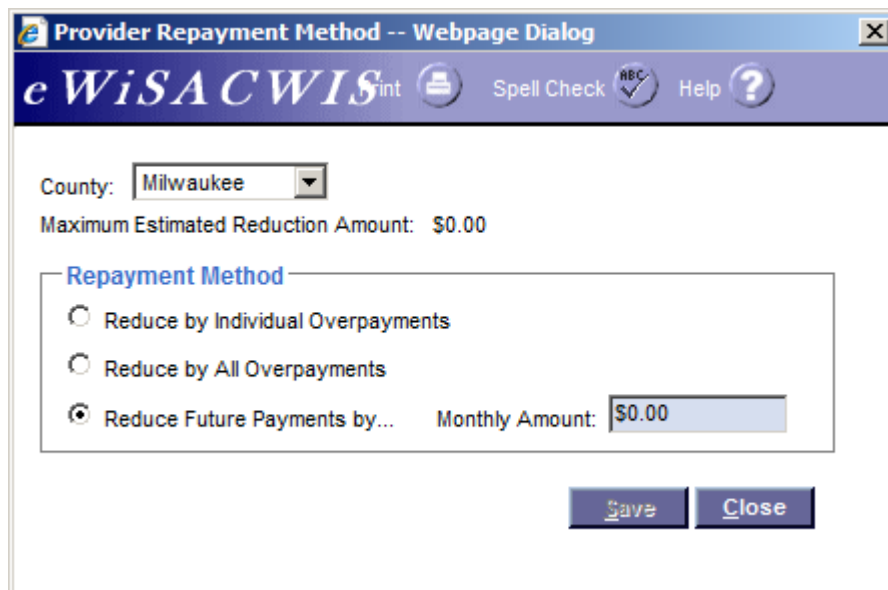
The form is titled "PIE Lead/Designee". It contains several input fields: "Name:" (text box), "Dept. Notified:" (text box with "00/00/0000"), "Begin:" (text box with "00/00/0000"), "End:" (text box with "00/00/0000"), "Login:" (text box), "Phone:" (text box), "Ext:" (text box), and "E-Mail:" (text box). There is a "Delete" link in blue text to the right of the "End:" field. At the bottom right, there is an "Insert" button. Below the form, there is a small icon of a computer monitor and the text "Electronic Funds Transfer" on the left, and a small icon of a document and the text "EFT" on the right.

9. Under the Options drop-down, you are able to maintain the Parent Agency History and Provider Repayment Method. Select Provider Repayment Method from the Options drop-down and click Go. If the provider record has not yet been saved, you will receive the following message:



The Provider Repayment Method is used to specify the method used to recoup any overpayments made to this provider. The Provider Repayment Method pop-up page appears. The county field is the county that is collecting an overpayment. Select from one of the three options for recovering the overpayment:

- Reduce by Individual Overpayments – This option indicates that the repayment method for this provider/county is being handled at the individual overpayment level.
- Reduce by All Overpayments – This option designates that the total of all overpayments made to this provider in this county should be removed from the provider's next check from this county.
- Reduce Future Payments by... -- This option designates that the amount entered in the Monthly Amount field should be removed from the provider's next check from this county.



The dialog box has a title bar that says "Provider Repayment Method -- Webpage Dialog". The main area has a header with the "eWiSACWIS" logo and icons for "Spell Check", "ABC", and "Help". Below the header, there is a "County:" dropdown menu with "Milwaukee" selected. Below that, it says "Maximum Estimated Reduction Amount: \$0.00". There is a section titled "Repayment Method" with three radio button options: "Reduce by Individual Overpayments", "Reduce by All Overpayments", and "Reduce Future Payments by...". The "Reduce Future Payments by..." option is selected. To the right of this option is a "Monthly Amount:" text box with "\$0.00" entered. At the bottom right, there are "Save" and "Close" buttons.

Click Save and Close to return to the Private Provider page.

10. The Background Checks tabs displays information for group homes, residential care centers, and shelters. This tab can be ignored for all other private providers.
11. The Characteristics tab allows you to record information that assists a worker when making placement decisions for a child. In the Family Accepts group box, you can select one or multiple values by using the CTRL key on the keyboard and selecting the Add button. This will move the selected values to the Selected Values Box. The same process is used to remove Selected Values and using the Remove button. Follow the same process for the Other Family Characteristics group box.

**Private Provider - Windows Internet Explorer**

**eWiSACWIS** TM Print Spell Check Help ?

**Basic**

Name: Waupaca Co Health and Human Services Open Date: Type: Other Government Agency Status: Pending

Lcns. Type: Not Licensed Lcns. Agency: not licensed ☐ Restricted Provider

**Provider Background Checks Characteristics Services Closing History**

Hold down the "Ctrl" key for multi-selection

**Provider Accepts**

Possible Values

- ADD/ADHD requiring medication
- Adoption only
- AIDS infection or HIV positive
- AODA
- At least one parent stays home
- Attachment
- Autism

Selected Values

Add x > Add All Values >> < Remove << Remove All

**Other Provider Characteristics**

Possible Values

- 24 Hour Awake Staff
- Access to Education Program
- After School Programs
- Age Appropriate Activities
- Arrange for Education Program

Selected Values

Add x > Add All Values >> < Remove

**Save Close**

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12. The Services tab maintains current information about the specific services offered by the provider.
- The Provider Preferences group box is user entered. The total of Males Preferred and Female Preferred cannot exceed the Total Bed Capacity. When the Total Bed Capacity is entered in the Provider Details group box, it will pre-fill the Males Preferred and Female Preferred fields. The Total Bed Capacity documents the number of children the provider is licensed to accept.
  - In the Provider Details group box, the Capacity documents the number of children the provider is licensed to accept, and the Placements and Reservations boxes are system entered.

Private Provider - Windows Internet Explorer

**eWiSACWIS**

TM Print Spell Check Help

**Basic**

Name: Waupaca Co Health and Human Services (9221784) Open Date: Type: Other Government Agency Status: Pending

Lcns. Type: Not Licensed Lcns. Agency: not licensed ☐ Restricted Provider

**Provider** Background Checks Characteristics **Services** Closing History

**Provider Preferences**

Max # of Placements Preferred: 0

Males Preferred: 0

Females Preferred: 0

Age: From: 0 To: 18

**Provider Details**

Total Bed Capacity: 0

	Male	Female	Total
Capacity:	0	0	0
Placements:	0	0	0
Reservations:	0	0	0
Vacancies:	0	0	0

**Active Services**

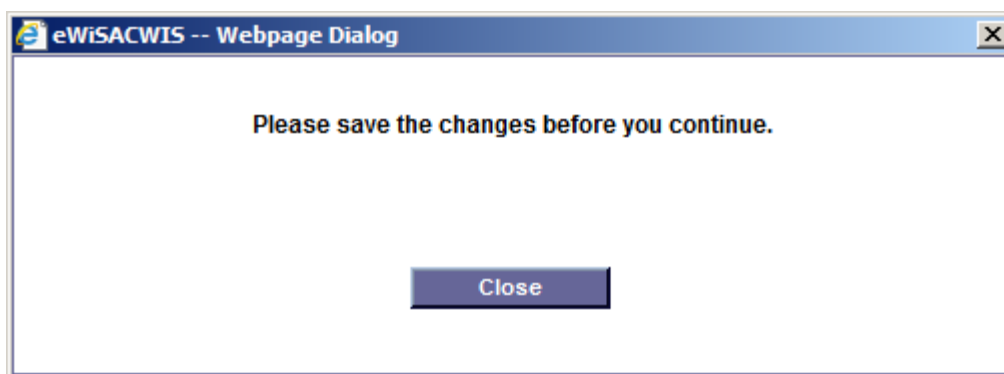
County: Milwaukee [Edit Services](#)

Category	Type	Status
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Save Close

Done Trusted sites | Protected Mode: Off 100%

13. The Active Services group box shows active services for the provider. To add an unlicensed service, select the Edit Services hyperlink. This will open the Edit Services page. If you have not yet already saved, you will receive this message.



Click Close to the message and click Save on the Private Provider page.

On the Edit Services page, the Unlicensed Services group box contains the Category, Type and Status. Select the appropriate values from the drop-downs. Remember to change the Status to Active. The Delete hyperlink will allow the row to be deleted from the record. Click Save and Close.

**Edit Services -- Webpage Dialog**

**eWiSACWIS** Print Spell Check Help

Provider Name: Waupaca Co Health and Human Services (9221784) Total Bed Capacity: 0 County: Milwaukee

**Unlicensed Services**

Category	Type	Status	
AODA Day Treatment	AODA Treatment	Active	<a href="#">Delete</a>

[View Inactive Values](#)

[Insert](#)

Options:  [Go](#)

[Save](#) [Close](#)

14. If you have not saved already, you will be required to save the provider record before you can approve it. On the Private Provider page, click Save. A potential match of address will occur. You may or may not be presented with a Potential Address Matches page. If a provider (or person) record already exists that matches the address you added on the Provider tab, the Potential Address Matches page will appear.

**Potential Address Matches -- Webpage Dialog**

**eWiSACWIS** Print Spell Check Help

eWiSACWIS has found the following potential matches to this address. Please check the list below before creating a new person and/or provider record.

**Potential Matches**

- [Waupaca Co Health and Human Services \(9221784\)](#) Other Government Agency 811 Harding Street, Waupaca, WI 54981

[Continue](#) [Close](#)

On the Potential Address Matches page, you can continue to create the provider if the potential matches for this address do not match the provider you are creating. To do so, click the Close button. This will return you to the Private Provider page.

If there is a match of the provider you are trying to create, select the radio button next to the provider you wish to select and click Continue. If the provider record is open, you will be presented with the Create Worker Assignment page. If the provider record is closed, you will be presented with the Private Provider page. To reopen the closed provider, click Save on the Private Provider page.

Potential Address Matches -- Webpage Dialog

**eWiSACWIS** Print Spell Check Help

eWiSACWIS has found the following potential matches to this address. Please check the list below before creating a new person and/or provider record.

**Potential Matches**

☒ [Waupaca Co Health and Human Services \(9221784\)](#) Other Government Agency 811 Harding Street, Waupaca, WI 54981

Continue Close

Create Worker Assignment - Windows Internet Explorer

**eWiSACWIS** Print Spell Check Help

Sort By: ☒ Name ☐ Position Title

**Workers**

[Select](#) Cat, Cathy A IA Social Worker

[Select](#) Corn, Cory A Adoption Unit Supervisor

[Select](#) Daisy, Dan Initial Assessment Supervisor

**View By**

☐ County/State

☐ Employing Entity

☐ My County

☐ Site/Office

☒ Workers for Supervisor

**Current Worker**

Daisy, Dan

**Current Worker Status**

☐ Close

☒ Do Not Close

**Assignment Definition and Details**

Category: Provider For: Waupaca Co Health and Human Services Participant: Start Date: 10/11/2013

☐ Emergency Protective Services Report

Worker Name	Type	Responsibility	Role

Assign Close

100%



15. To approve the provider record, click on the Provider tab and select approval from the Options drop-down and click Go. To On the Approval History page, click the Approve radio button and click Continue. Back on the Private Provider page, click the Save button.
16. The final tab is the Closing History tab. To close the provider record, click the Insert button in the Provider History group box. The Open Date will pre-fill based upon when the provider record was opened or reopened. The Closed Date will pre-fill when the closure has been accepted. The Reason drop-down is a user-selected field. The Completed checkbox allows the user to submit the provider for closure. If this checkbox is not checked, the provider record will remain open and the closure denial messages will not be validated. The Closed By field will pre-fill with the name of the worker who completed and saved the closure.

**Private Provider - Windows Internet Explorer**

**eWiSACWIS** TM Print Spell Check Help

**Basic**

Name: Waupaca Co Health and Human Services (9221784) Open Date: 12/20/2012 Type: Other Government Agency Status: Open

Lcns. Type: Not Licensed Lcns. Agency: not licensed ☐ Restricted Provider

**Provider** Background Checks Characteristics Services **Closing History**

**Provider History**

Open Date	Closed Date	Reason	Completed	Closed By
12/20/2012		Provider no longer offering services	<input checked="" type="checkbox"/>	

[Delete](#)

**Insert**

**Closure Denial Messages**

**Linked Providers**

Open Date	Completed Date	Provider Name	Provider Number
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**Save** **Close**

Done Trusted sites | Protected Mode: Off 100%

17. If the provider is denied closure, see the Closure Denial Messages. Once all messages have been corrected, click the Completed checkbox and click Save. Verify there are no other denial messages. If the page has become frozen, the closure was successful. If the page is enabled, view the closure denial messages and fix the errors.
18. See the associated Closing a Provider Record User Guide for additional information.